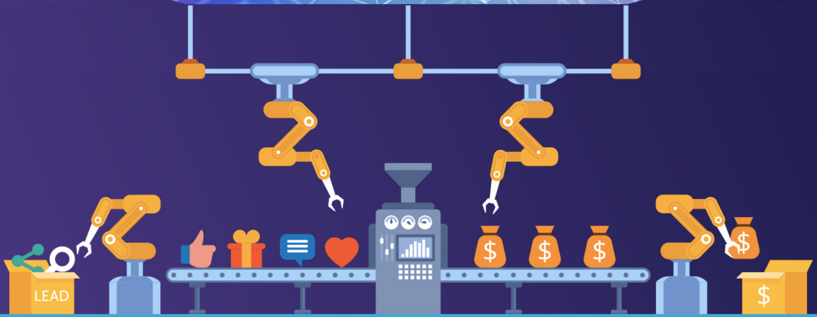
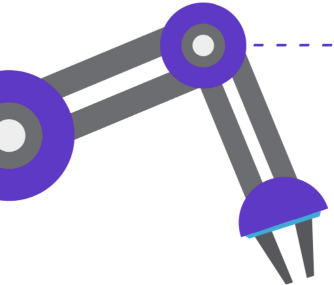
Marketo

Maximize Effectiveness:

Marketing Automation Workflows Every Marketer Should Know



What Is a Marketing Automation Workflow?



Marketing Automation workflow

A set of automated actions you set up to respond to certain customer behaviors or external events. Companies with strong marketing automation processes may have workflows for many new subscribers, new customers, new qualified leads, and more.

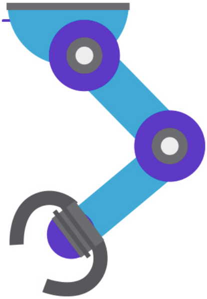
What Are Your Marketing Automation Goals?

Successful marketing automation requires clear, measurable goals.

- **More sales-qualified leads**
- **Shorter, more efficient sales cycle**
- **More conversions and sales**
- **More engaged customers**
- **More cross-selling and up-selling**
- **Better measurement of marketing**

Common Marketing Automation Workflows

Turn Prospects into Leads



“Welcome!”

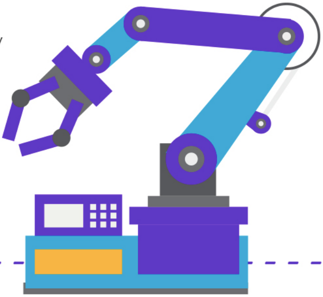
Welcome your new subscribers

Trigger: New user subscribes
Result: Series of onboarding emails with helpful resources

“Can we interest you in something else?”

Share related resources with new users.

Trigger: User downloads a gated resource on [X] topic
Result: Message with related resources or next steps
Bonus: If they continue to explore more content, they become a warm lead



Turn Leads into Customers

“Who’s ready to buy?”

Quickly follow up with “hot leads”

Trigger: The user’s lead score reaches “hot lead” status after viewing a certain resource
Result: Sales is automatically notified to reach out

“They’re perfect for us!”

Send personalized content to your ideal leads.

Trigger: Someone in your ideal industry or target role fills out a form
Result: Follow-up message with content specific to their industry or role
Bonus: Sales department can reach out personally with special industry offers

“Let’s try again later on!”

Recycle leads and try to convert them in the future

Trigger: Lead marked as closed/lost in CRM
Result: Lead is routed back to your nurture process to pursue in the future
Bonus: Set up unique workflows for different loss reasons, such as “chose a competitor,” “no

decision," etc. so your nurture campaign is highly relevant

"Keep us in mind for later."

Encourage lost contacts with product updates, special offers, etc.

Trigger: The user's lead score reaches "hot lead" status after downloading a certain resource
Result: After a few months, send a product update or a special offer to hopefully re-engage

"Are you still with us?"

Re-engage subscribers who aren't opening your emails

Trigger: Subscriber hasn't opened emails or visited the site in 6 months
Result: Send a personalized "we miss you!" email
Bonus: If they don't re-engage, offer to remove them from the email list

Turn Customers into Highly Engaged Customers

"Welcome aboard!"

Onboard new customers consistently

Trigger: New customer purchases your product or service
a certain resource
Result: Share a "beginners" series with guides, manuals, and tips for using the product

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"Come see us at our next event!"

Promote your special events

Trigger: Special company event is coming up
Result: Invite prospects to the event and promote special sessions, public events, etc.
Bonus: Add likely attendees (in a specific location or niche) to a special list so the sales department can follow up personally

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"Ready to take the next step?"

Drive "stuck" users to new solutions or to customer service

Trigger: A user or prospect isn't using the product fully because of a technical problem or product issue
Result: A personal invitation to try a new solution or to contact customer service

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"Don't forget, your renewal is coming up soon."

Remind customers of upcoming purchases or renewals

Trigger:A customer's automatic payment or product renewal is coming up in one month
Result: A reminder message about the upcoming payment or renewal

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"Thanks for your business!"

Send exclusive offers or insider info to your most loyal customers

Trigger: A customer reaches a significant milestone (years with the product, features used, "loyalty score" achieved)
Result: A special offer or inside information is shared with the customer as a reward for their loyal business

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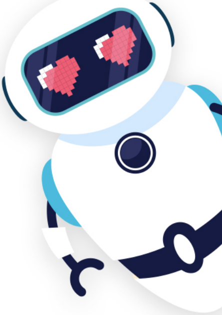
"Ready to try something new?"

Nudge customers to try other parts of your product.

Trigger: A current user has only tried one or two parts of your product
Result: A reminder message about other features they haven't yet explored



Ready to put these workflows into practice?

Use the Marketing Automation Buyer's Kit to choose the right automation platform for your business:
marketo.com/ma-buyers-guide

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